



TELECOMMUNICATIONS MARKET SNAPSHOT: ITALY

Key Statistics

Population	61,016,804 (July 2011 est.)
GDP	\$1.782 trillion (2010 est.)
Per capita GDP	\$30,700 (2010 est.)
Main lines	21,699,000 (2009)
Teledensity	36.24 % (2009)
Mobile subscribers	88,013,000 (2009)
Mobile penetration	147.01 % (2009)
Internet users	29.235 million (2009)
Internet penetration	34.39% (2008)
Broadband subscribers	12,300,000 (2009)
Spending on telecom equipment and services	\$45,846.5 million (2010)
U.S. equipment exports to market	\$164,893,503 (2010)

Sources: CIA World Factbook, USITC, ITU, Worldwide Black Book, and BMI

Market Overview

With one of the highest mobile penetration rates in the region, Italy's mobile sector is predicted to continue growing. Based on data from 2010, Telecom Italia holds the largest share of the market with 36.9% of the market, followed by Vodafone Italia with 28.4%, WIND with 23.6% and 3 Italia (a subsidiary of Hutchison Whampoa LTD) with 11%. All four operators provide 3G services, with 3 Italia serving the most 3G customers. As for more advanced technology, Alcatel-Lucent signed an agreement with Telecom Italia in 2010 to trial LTE technology.

The fixed-line market in Italy has been experiencing a decline with the exception of WIND-Infostrada, which has seen a growth in subscriptions. Telecom Italia, another major player in this market, announced in 2008 that it would separate the management of its fixed-line network into a new division called Open Access to ensure fair competition at the request of telecom regulator AGCOM.

While the broadband penetration rate in Italy is among the lowest in the region, there is strong growth in subscriptions. Telecom Italia also dominates this market, serving 7.186 million subscribers; Fastweb follows with 1.847 million, WIND-Infostrada with 1.792 million, Vodafone with 1.8 million and Tiscali with 590,000 thousand. The Italian government announced that it would invest in Telecom Italia's broadband infrastructure once the separation of TI's local network from its commercial operations was complete. In 2010, all operators in the broadband market joined in an NGN initiative to co-invest in a fibre-optic network spanning all of Italy.

Telecom Trade Agreements

WTO

As a member of the EU, Italy has made commitments covering both basic and value-added telecom services in the World Trade Organization (WTO). For a list of the country's commitments, go to http://www.wto.org/english/tratop_e/serv_e/telecom_e/telecom_commit_exempt_list_e.htm. Italy is also a signatory to the WTO Information Technology Agreement, which completely eliminates duties on a variety of info-communications technology products by January 2000.

Leading Service Providers

Fastweb

<http://www.fastweb.it/>

Telecom Italia

<http://www.telecomitalia.it/>

Vodafone Italia

<http://www.vodafone.it/>

WIND

<http://www.wind.it/>

3 Italia

www.tre.it/

Contacts

Regulatory

Autorità per le garanzie nelle comunicazioni (AGCOM)

<http://www.agcom.it/>

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